

USA Ethanol Production Survey Preliminary Findings



Presentation to Air Resources Board

Meeting on Regulatory & Non-
Regulatory Fuels Activities

July 12, 2001

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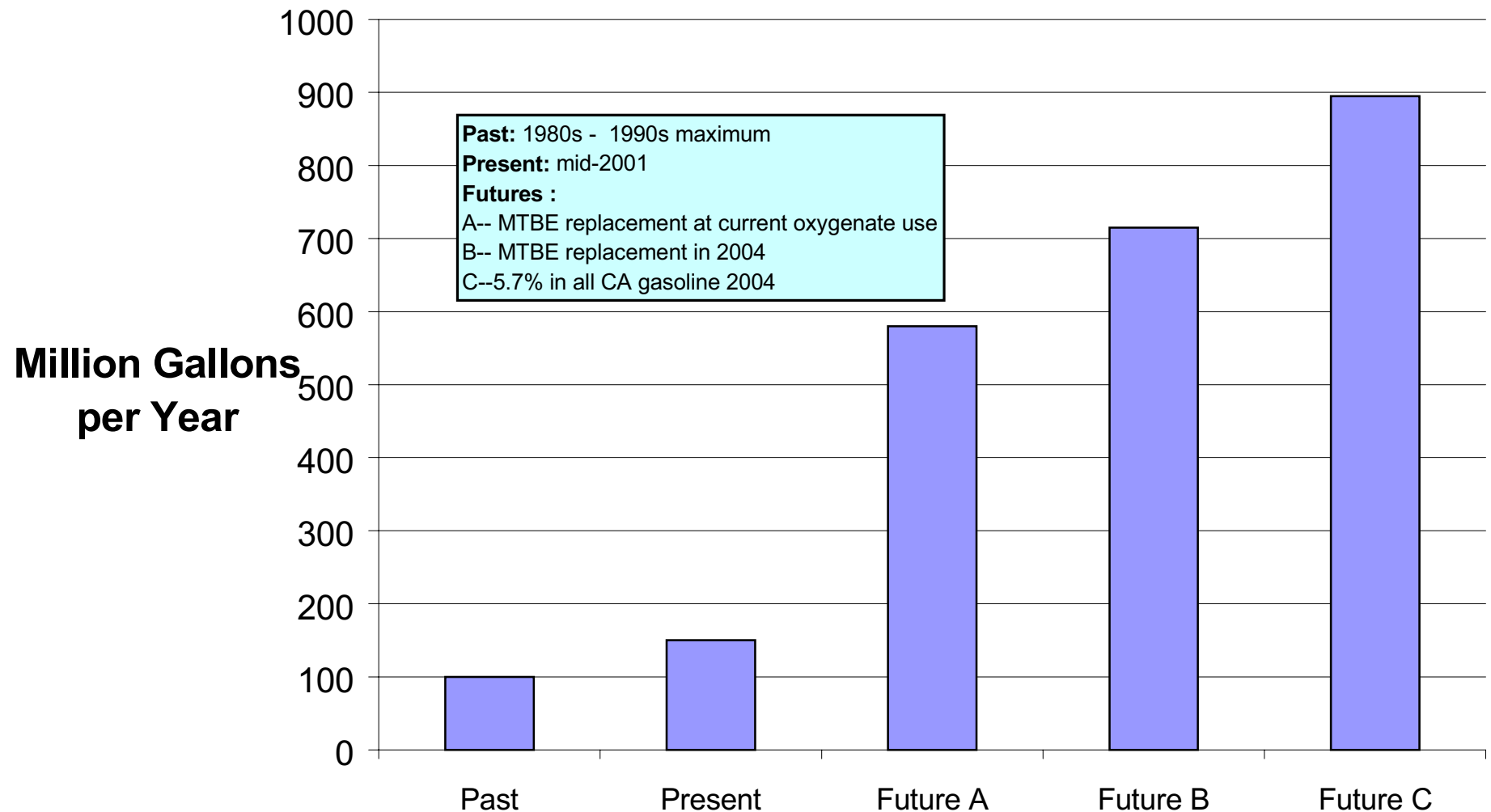
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Presentation Topics



- Ethanol Demand for Gasoline Blending in California
- Survey Status
- Preliminary Survey Results
- Next Steps

California Ethanol Demand for Gasoline Blending



USA Ethanol Survey Status



- Ethanol survey sent May 18, 2001
- Surveyed 66 ethanol companies
- As of today, 44 survey responses received representing 41 existing plants and 43 new plants
- Still actively pursuing & accepting industry responses (at least 22 companies have not responded)

Ethanol Survey

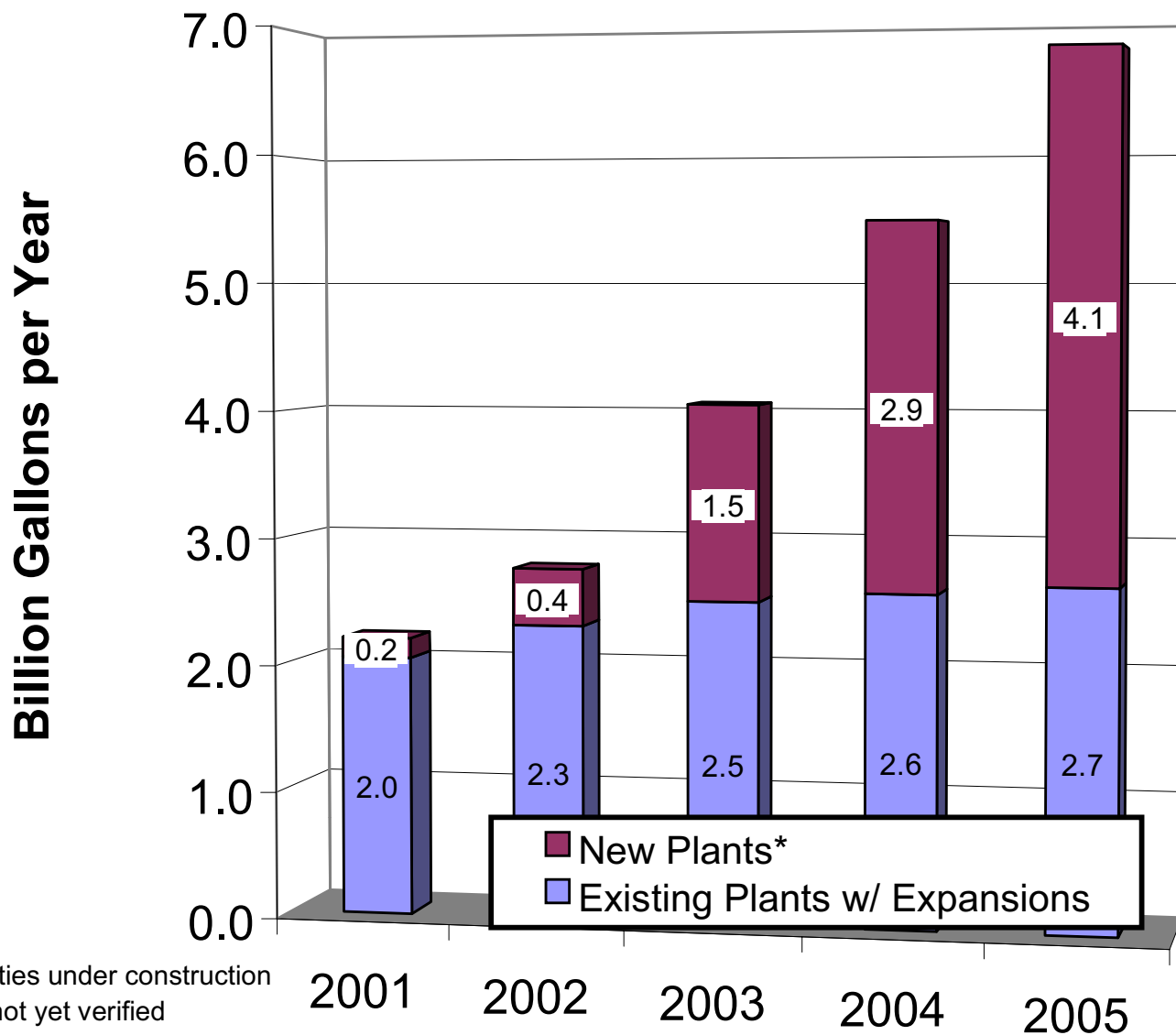
Preliminary Results



- 73% of existing plants accounted for in responses to date
- Over 90% of existing production volume is captured (assumed 2.0 billion in existing production)
- 99% of respondents indicated they can produce CARB compliant denatured ethanol
- Survey results show 2.0 billion gallons of new ethanol production capacity for 2003 (New plants include facilities under construction and planned production not yet verified)

USA Ethanol Production Survey

(Preliminary Results as of July 12, 2001)



*New plants include facilities under construction and planned production not yet verified

Preliminary Survey Results

- Logistics



- Almost all existing ethanol plants can ship ethanol via rail
- About half of existing ethanol plants can transport ethanol by barge

Next Steps



- Continue to update survey
- Identify logistical challenges for transporting, marketing and distributing ethanol to California and within the state
- Ethanol Supply Outlook Report for December 31, 2002 MTBE phase out will be prepared December, 2001